



# LifeSize Channel Partner Program Guide

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## Part 1: Introduction and Overview

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### **Guide Overview**

This guide is designed to assist you in understanding the opportunities, program components and investments that will help you take full advantage of the LifeSize Communications (LifeSize) Channel Partner Program.

Becoming an authorized LifeSize Partner is the first step to being successful in the LifeSize Channel Partner Program. At the base, achieving authorization ensures that your organization has the knowledge to position, sell, design and install LifeSize solutions. Not only does authorization provide you with the skills to position LifeSize solutions, it also provides you with access to the features and benefits available through the LifeSize Channel Partner Program.

To build on your authorization status and to assist you in growing your business, LifeSize offers opportunities in:

- [Business Development](#)
- [Marketing](#)
- [Sales](#)
- [Service and Support](#)

### ***Business Development***

LifeSize's open-standards solutions, along with our commitment to a strong channel program, provide you with a unique opportunity to offer innovative best-of-breed solutions, build a knowledgeable presales organization with minimal investment and develop strategic plans to help you be competitive and grow your business.

#### **Product portfolio**

- As a partner, you have authorization to sell LifeSize hardware, software and services to complement your current product portfolio.

#### **Discounts and incentives**

- Base-level discounts and programs, such as Opportunity Registration, are designed to provide you with improved profitability and revenue growth.

**Business plan**

- A joint-developed plan is focused on leveraging the core strengths of our relationship to foster new business. On a regular basis, we will meet to review information on the previous quarter to ensure that we duplicate our successes and overcome any hurdles.

**Certification and training**

- Make sure your organization knows about the latest sales strategies, technical innovations and advances in HD video from LifeSize so you stay competitive.

**Demo equipment program**

- Purchase LifeSize equipment at an aggressive discount to showcase it to your customers.

**Partner Advisory Council**

- The Partner Advisory Council (PAC) gives a select group of partners an opportunity to provide feedback to LifeSize on products, programs and other channel-related activities. PAC members will represent the LifeSize channel community with their ideas and leadership.

**Marketing**

A key component to building a successful relationship is developing joint marketing efforts with LifeSize to increase new opportunities with and awareness among your customers.

**Joint marketing activities**

- From trade shows and seminars to e-marketing and call campaigns, partner website content and SEO/SEM best practices and collateral, as a LifeSize partner, you will have access to the resources you need to promote our solutions.

**Joint marketing opportunities**

- To assist you in funding strategic campaigns, you may be eligible to request market development funds (MDF) for approved joint market awareness and lead-generation activity.

**LifeSize Partner Portal**

- The Partner Portal is our online source for marketing tools, presentations, price lists and collateral.

**Marketing support**

- Marketing support through LifeSize or your distributor is available to assist you in planning and implementing lead-generation activities.

**Sales**

The right sales tools, training and programs will help you find and win new opportunities with greater potential for increased margins. As a LifeSize Partner, you have access to additional discount programs, training and resources to assist you with positioning, designing and selling LifeSize solutions.

**Opportunity Registration Program**

- Register your new LifeSize opportunities to apply for an additional discount. The Opportunity Registration Program can help you stay competitive in your account and protect your new LifeSize opportunities.

**Sales support**

- Channel Account Managers and distribution partners are available to assist you with quotes, RFPs and strategies for positioning LifeSize solutions to your customers.

**Presales technical support**

- The LifeSize Inside Sales Team and our distributor partners are available to answer questions and assist you with presales designs.

## **Service and Support**

LifeSize lets you decide where you can be most successful by allowing you to focus on your strengths. Our postsales service and support offerings give you the power to decide just how much service you wish to provide.

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## **Rewarding Your Investment**

The investment you make and the program level you choose are keys to your success in the program. Our sales certification program is available at no cost, so the more people in your organization who are certified with our partner training program, read our newsletter and regularly use our partner site, the better they will be at positioning a LifeSize solution.

Ultimately, we believe that the more time you invest in the program, the more you will see improved profitability, revenue growth and opportunities to explore new markets. Based on your program level, LifeSize has made a conscientious effort to keep the program guidelines reasonable and the partner-level requirements attainable.

## **Partner Levels**

LifeSize provides two authorized partner levels and one registered partner level. An authorized partner is defined as a reseller that is current with its respective program-level requirements.

### **Authorized Partner Levels**

Expert Video Partner  
Professional Video Partner

## **Expert Video Partner**

As its name implies, Expert Video Partner is our premier partner designation. This level offers access to the most benefits and support but requires a higher investment. The level is most appropriate for large national and multinational system integrators and service providers and key regional resellers capable of selling, installing and servicing large integration projects. At this level, you are strongly positioned to lead with LifeSize solutions participating in joint selling, comarketing and ongoing training activities.

### Expert Video Partner Requirements

- ✓ Have an executed Reseller Agreement and remain in good standing with LifeSize
- ✓ Meet the minimum sales volume requirement
- ✓ Develop and submit a business and marketing plan
- ✓ Obtain four sales certifications—LifeSize Certified Sales Expert (LCSE)
- ✓ Obtain two presales technical certifications—LifeSize Certified Technical Expert (LCTE)
- ✓ Purchase demo equipment (minimum of two video endpoints)
- ✓ Provide end-user reporting to LifeSize or distributor
- ✓ Provide forecasts to LifeSize
- ✓ Sell required Assurance Maintenance Services (Partner Assurance Maintenance or LifeSize Assurance Maintenance)

### **Professional Video Partner**

As a Professional Video Partner, you have access to a complete set of tools and training, equipping you to market, sell and implement LifeSize's full set of solutions, balanced with a reasonable investment. The Professional Video Partner designation is reserved for quality regional and national resellers who offer complete solutions to their customer base.

### Professional Video Partner Requirements

- ✓ Have an executed Reseller Agreement and remain in good standing with LifeSize
- ✓ Meet the minimum sales volume requirement
- ✓ Obtain two sales certifications—LifeSize Certified Sales Professional (LCSP)
- ✓ Obtain one sales technical certification—LifeSize Certified Technical Professional (LCTP)
- ✓ Purchase demo equipment (minimum of one video endpoint)
- ✓ Provide end-user reporting
- ✓ Sell required LifeSize Assurance Maintenance Services

### **Registered Video Partner**

The Registered Video Partner designation is reserved for resellers within key local markets, typically metropolitan or regional. At this level, you have the ability to sell only the LifeSize Express portfolio, Passport, Desktop and Phone products with minimal investment.

### Registered Partner Features

- ✓ Have an executed Reseller Agreement
- ✓ Meet the minimum sales volume requirement
- ✓ Obtain one sales certification—LifeSize Certified Sales Professional (LCSP)
- ✓ Sell required LifeSize Assurance Maintenance Services

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## Part 2: Program Details

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### **Channel Program Requirements**

To participate in the LifeSize Channel Partner Program, you must be an authorized partner. To maintain authorized status, you must meet all the program requirements at your partner level.

Program Requirements	Expert Video Partner	Professional Video Partner	Registered Video Partner
<b>Annual Minimum Sales Volume</b> (Hardware & services at list price)	\$1M	\$200K	\$40K
<b>Reseller Agreement</b>	Required	Required	Required
<b>Assurance Maintenance Services</b> (Required)	Yes – Either Partner Assurance Maintenance or LifeSize Assurance Maintenance	Yes – LifeSize Assurance Maintenance	Yes – LifeSize Assurance Maintenance
<b>Business Plan</b>	Required	Recommended	-
<b>Marketing Plan</b>	Required	Recommended	-
<b>Quarterly Business Review</b>	Required	Recommended	-
<b>Certified Sales Expert</b>	4	-	-
<b>Certified Technical Expert</b>	2	-	-
<b>Certified Sales Professional</b>	-	2	1
<b>Certified Technical Professional</b>	-	1	-
<b>Demo Equipment Purchase</b>	Required - 2 Endpoints	Required - 1 Endpoint	-
<b>End-User Data/POS</b>	Required	Required	Required
<b>Forecasting</b>	Required	Required	-

### **Minimum Sales Volume Requirement**

Expert Video Partners and Professional Video Partners must attain the annual sales volume requirement to remain in the program level. The sales volume requirement will be based upon the reseller's buy price for both products and services sold through direct purchase from LifeSize or indirect purchase through point-of-sale (POS) data provided by LifeSize distributors. Sales volume will be reviewed quarterly to ensure that you are on track to meet the annual target.

### **Reseller Agreement**

Expert Video Partners and Professional Video Partners will be required to sign a Reseller Agreement to join the LifeSize Channel Partner Program. Once you have been approved, you will receive a Reseller Agreement that must be signed and returned to LifeSize before you can begin taking advantage of the program benefits. Registered partners also have to sign a Reseller Agreement for access to the products and to the LifeSize Partner Portal. To request a Reseller Agreement, send an e-mail to [americaschannels@lifesize.com](mailto:americaschannels@lifesize.com)

### **Business Plan**

Expert Video Partners are required to complete and submit a business plan that will include the marketing, sales and support goals. The business plan will be reviewed quarterly with your LifeSize Channel Account Manager to:

- Create an ongoing business plan for product and service sales through the Channel Partner Program.
- Review the relationship and performance of both your organization and LifeSize within the program.

The business plan should include progress on previous business plans, current and future partner requirements for LifeSize products, sales volume requirements, support issues and end-user feedback. If you are unable to meet with your LifeSize Channel Account Manager, you will be responsible for the creation of the ongoing business plan. Professional Video Partners are also strongly encouraged to complete a business plan.

### **Marketing Plan**

A marketing plan is part of the business plan and will be used to support requests for marketing development funds (MDF). Marketing plans should include the specific activity, estimated costs, anticipated return on investment (ROI), pre- and postmarketing efforts, as well as any specific requests for LifeSize marketing support.

The marketing plan is reviewed and, where applicable, adjusted on a quarterly basis to stay in tune with market and business changes. The review and adjustments are done in collaboration with the LifeSize Channel Marketing team and your Channel Account Manager. All marketing requests can be approved only by the LifeSize Channel Marketing team. See the [Marketing with LifeSize Guide](#) for more details.

### **Sales & Technical Certifications**

Training and certifications are an integral part of the LifeSize Channel Program. To maintain authorized status at each program level, partners must meet the sales and technical presales requirements. Coursework and exams to obtain the LifeSize Certified Sales and Technical courseware are available on LifeSize's Partner Portal. For certification requirements, see "Certification Programs" on page 16.

### **Demo Equipment Purchase**

Expert Video Partners are required to purchase a minimum of two video endpoints, and Professional Video Partners must purchase one video endpoint. Partners should use them according to the program requirements for a minimum of 12 months. For complete details, see "Demo Equipment Program" on page 20.

### **End-User Data**

All partners must provide end-user data at the time they place a purchase order with either LifeSize or the distributor. Program discounts are effective only if this information is included on the order. All advanced services programs require end-user sales-out data to enable Assurance Services initiation. Partners must update



the end-user data to set the correct Assurance Services dates within the Partner Portal for both standard warranty and Assurance Services programs. Failure to report sales-out data will result in the customer's having inconsistent service coverage dates.

LifeSize reserves the right to request and receive end-user records. Such reports will include, at a minimum, sales in terms of each product model, number distributed, price paid to LifeSize and each end-user name and location including postal code.

### ***Forecasting***

Expert Video Partners with a Direct Reseller Agreement are required to supply a 90-day nonbinding forecast to LifeSize on the first day of each month. This forecast is used to assist LifeSize in manufacturing-build planning and improves our lead-time commitments to our channel community. Expert and Professional Video Partners who procure product from LifeSize's distributors are also required to provide their local LifeSize Channel Account Managers or Inside Sales Representatives with a forecast from time to time. Additional discounts are available for those Expert and Professional Video Partners who register their opportunities and provide updates on those opportunities.

### ***Partner-Level Adjustments***

LifeSize retains the right to adjust the partner level if the requirements aren't fully met within 30 days.

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## Channel Program Benefits

<b>Americas Program Benefits</b>	<b>Expert Video Partner</b>	<b>Professional Video Partner</b>	<b>Registered Video Partner</b>
<b>Product and Service Portfolio</b>	All LifeSize products	All products, excluding LifeSize Conference product line	LifeSize Express portfolio, Passport, Desktop and Phone only
<b>Hardware Discount</b> (Unless a different discount is specified on price list)	35% direct or suggested via distributor	25% suggested via distributor	15% suggested via distributor
<b>Assurance Maintenance Services Discounts</b> (Unless a different discount is specified on price list)	35% – Partner Assurance Maintenance 25% – LifeSize Assurance Maintenance	15% – LifeSize Assurance Maintenance	5% – LifeSize Assurance Maintenance
<b>Training</b>	Yes – online and on-site	Yes – online	-
<b>Certification</b>	Yes	Yes	-
<b>Sales Support</b>	Yes	Yes	Through distributor
<b>Technical Presales Support</b>	Yes	Yes	Through distributor
<b>Directory Listing in LifeSize Partner Locator</b> (Guidelines must be met)	Yes	Yes	-
<b>Partner Advisory Council</b>	Yes	By invitation	-
<b>Opportunity Registration</b>	Yes – 5% or 10%	Yes – 5% or 10%	-
<b>Demo Equipment Discounts</b> (Unless a different discount is specified on price list)	65% endpoints Yes – 50% infrastructure 50% software	65% endpoints Yes – 50% infrastructure 50% software	-
<b>Qualified Leads</b>	Yes	Yes – selectively	-
<b>Competitive Price Support</b>	Yes	Yes	-
<b>MDF</b>	Yes	Case-by-case	-
<b>Financial Program</b> (Leasing upon acceptance)	Yes	Yes	-

### **Product Portfolio**

Expert and Professional level partners will have selling access to the entire LifeSize product portfolio. Partners must be at the Expert level to sell Partner Assurance Maintenance Services.

Registered Video Partners will have selling access to LifeSize's Express portfolio, LifeSize Passport, LifeSize Desktop and LifeSize Phone products as well as LifeSize Assurance Services.

### **Program-Level Discounts**

Base-level discounts for hardware, software and service programs are based on your program level. Expert Video Partners who have a Direct Reseller Agreement with LifeSize will receive their discount from LifeSize. Expert Video Partners, Professional Video Partners and Registered Video Partners with a signed Indirect Reseller Agreement will receive their discount as set by their distributors of choice.

### **Assurance Maintenance Services**

Assurance Maintenance Services provide end customers with comprehensive support services for their LifeSize products and are required for all hardware purchases. A detailed overview and specification of LifeSize Assurance Maintenance Services can be found on the LifeSize Partner Portal.

The Assurance Maintenance Services requirement can be fulfilled by two services offerings:

#### **Partner Assurance Maintenance Services – PAMS (higher discount level)**

Available to those Expert Video Partners who meet all of the requirements for supporting their end customers, including sales/technical certification, tier 1–2 phone support and the related support infrastructure, Partner Assurance Maintenance Services reward Expert-level partners with an additional discount for services. PAMS are required with hardware purchases. For Expert Video Partners, utilizing the Assurance Maintenance Services provides end customers with comprehensive support services for their LifeSize products and is required for all hardware purchases.

#### **LifeSize Assurance Maintenance Services – LAMS (regular discount level)**

Available to any partner from the Registered to Expert levels, LifeSize Assurance Maintenance Services extend a standard discount along with LifeSize technical support, providing tier 1–3 technical phone support (excludes on-site services). LAMS are required with any hardware purchase for Registered and Professional Video Partners.

### **Sales Support**

The LifeSize channel sales team and our distribution partners are available to provide assistance with business and marketing plans, training, proposals, configuration and order processing.

### **Technical Presales Support**

Technical presales support is provided by LifeSize presales engineers within the local region for partners.

### **Directory Listing in LifeSize Website**

To increase visibility, awareness and lead generation for our channel partners, authorized partners who have completed the partner website requirements will be highlighted within the LifeSize website at <http://www.lifesize.com/partners>

### **Partner Advisory Council**

Authorized Expert Video Partners are eligible to join the Partner Advisory Council. Meetings will be held once a year. Professional Video Partners will have the opportunity to join by invitation only. Participation is at the sole discretion of LifeSize and the partner.

## LifeSize Partner Portal Access

LifeSize Expert Video Partners and Professional Video Partners covered under a service contract (LifeSize Assurance Services Program) or Assurance Services are provided with privileged web access that allows them to view the support sections on the LifeSize website at <http://eportal.lifesize.com:8080/PartnerPortal/login.doc>

A Partner Portal services and support account gives you access to a wide range of tools to help track and manage based on the level of access granted. Some of the services and support are:

- Expedited technical support services
- Services entitlements and service search per authorized partner
- LifeSize knowledge base
- RMA
- Service requests
- Product documentation
- Release notes
- LifeSize tech notes
- LifeSize training and certification

Role	Register Opportunities	Assign Opportunities	Access Opportunities	Documents	Orders	Tech Cases
Sales Director	X	X	X	X	X	X
Salesperson	X		X	X		X
Reseller Salesperson*	X		X	X		X
Support				X		X
Sales Admin				X	X	X
Documents Access				X		

## Opportunity Registration

Authorized Expert Video Partners and Professional Video Partners have the opportunity to earn an additional 5% or 10% discount off US list price based on opportunity size. For complete details, see “Opportunity Registration” details later in this document.

## Demo Equipment Program

The Demo Equipment Program provides the opportunity to purchase demo gear at significant discounts to use in the reseller’s lab, training or showroom facility. For complete details, see “Demo Equipment Program” on page 19.

## Competitive Price Support

LifeSize will consider additional discounts in competitive opportunities. Partners must be in good program standing and currently meeting all program-level requirements to be considered for competitive price support. Price support approval is at the sole discretion of LifeSize.

## MDF

Expert partners are eligible for MDF. Professional Video Partners’ MDF requests are reviewed on a case-by-case basis.

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## **Assurance Maintenance Services (Detail Description)**

Assurance Maintenance Services are a comprehensive set of maintenance and professional service products that allow customers to extend the life of their LifeSize hardware and software products.

The Partner Assurance Maintenance Service (PAMS) program is provided to Expert Video Partners only and requires that they have the specified knowledge and staff to provide direct end-user support.

The LifeSize Assurance Maintenance Service (LAMS) program provides a high level of investment protection and extends the standard warranty provided with LifeSize products.

PAMS and LAMS carry several requirements, as follows:

### ***Service Contract Management***

The selling relationship for Assurance Service agreements is between the partner and the end user. The partner is responsible for providing the quote, the order and the delivery of the service agreement if an Assurance Service contract has been purchased, unless otherwise specified. All service delivery requirements are fulfilled by the partner unless the certified partner has purchased direct customer support.

### ***Point-of-Sale Data***

The partner must agree to supply POS data directly to LifeSize or to its distributor for all systems that the partner has sold to end users. Having correct and effective data on the locations and types of units that have been sold is critical to proper service delivery, even when the partner is the primary service delivery provider. Partners are required to provide LifeSize with the sales-out data for all service programs. LifeSize retains the right to refuse services for products without end-user data.

### ***Level 1 and Level 2 Support Capability***

Under PAMS, the Expert Video Partner owns the direct interaction with the end user and utilizes LifeSize's technical support staff as a tier 3 resource for escalated issues. The partner must have resources, technical staff and a call center with the appropriate level of staffing to be able to provide direct end-user support coverage at least eight hours a day, five days a week. Partners without technical support staff must purchase LAMS as a part of their service solution.

### ***Technical Assistance Coverage***

Under PAMS, the Expert Video Partner must have a technical assistance center (TAC), with which end users can interact to request assistance. The partner must have at least two LifeSize certified engineers per call center who must keep their certifications current. Annual certifications are required for each partner certified engineer. Should one certified engineer leave the partner organization, a new engineer must be certified. In addition, partners must have the necessary LifeSize infrastructure to support troubleshooting and address customer calls. Partner TACs are subject to yearly audits by an authorized LifeSize representative.

### ***Automated Case Logging and Automated Asset Tracking System***

Under either PAMS or LAMS, the partner must have systems and resources to properly open, track and manage service requests from its end users. Included as part of that system, the partner must be able to maintain, track and manage all asset information (product, serial number, location, service entitlement type, service entitlement term and warranty type and term).

Partners are responsible for tracking and enabling service coverage for their customer base. LifeSize retains the right to contact customers if their service contracts are not renewed by the authorized partner within 30 days of contract expiration.

### **Partner Assurance Maintenance Services**

Available to those Expert Video Partners who meet all the requirements for supporting their end customers, including sales/technical certification, is tier 1–2 phone support and the related support infrastructure. PAMS reward Expert Video Partners with an additional discount for services. PAMS are required with all hardware purchases for Expert Video Partners, utilizing the Expert-level price list and parts.

Partners will utilize commercially reasonable efforts to provide resolution to problems by providing electronic and telephone assistance to the point of contact designated, including:

- Information gathering
- Log file analysis
- Research, including reproducing LifeSize-specific issues
- Acquiring additional information during the troubleshooting process
- Providing a resolution or steps toward a resolution
- Configuration change recommendations
- Escalation of reported errors to engineering and product groups within LifeSize

### **Partner Responsibilities**

To receive support, customers are responsible for complying with the following conditions:

- The situation presented to the LifeSize support representative is reproducible on a single system.
- The LifeSize product is on the most current software version.
- The system, including software and hardware, is accessible and available to the partner or customer representative requesting assistance without limit during any telephone discussions.
- The representative will follow the instructions and suggestions of LifeSize's support personnel.

### **PAMS do not include the following:**

- On-site support
- Support when compatibility of the software is in question or the configuration is invalid according to the published specifications for the LifeSize product
- Third-party peripherals such as displays or control device support
- Support for products being utilized outside the country from which they were purchased
- Support for versions of products older than the most current LifeSize release (support on older versions is provided on a commercially reasonable basis)
- Remote or on-site training services
- Command line interface integration or scripting
- Product keys for activation
- Recovery of lost passwords or end-customer data
- Support due to accidental or intentional damage by the end customer
- Any activities not expressly described in this section of the service description

### **LifeSize Assurance Maintenance Services**

Available to any partner from the Registered to Expert level, LAMS extend a standard discount with LifeSize technical support providing tier 1–3 technical phone support (excludes on-site services). LAMS are required with all hardware purchases from Registered and Professional Video Partners.

**Customer Responsibilities**

To receive support, customers are responsible for complying with the following conditions:

- The situation presented to the LifeSize support representative is reproducible on a single system.
- The LifeSize product is on the most current software version.
- The system, including software and hardware, is accessible and available to the partner or customer representative requesting assistance without limit during any telephone discussions.
- The representative will follow the instructions and suggestions of LifeSize's support personnel.

**LAMS do not include the following:**

- On-site support
- Support when compatibility of the software is in question or the configuration is invalid to the published specifications for the LifeSize product
- Third-party peripherals such as displays or control device support
- Support for products being utilized outside the country from which they were purchased
- Support for versions of product older than the most current available LifeSize release (support on older versions is provided on a commercially reasonable basis)
- Remote or on-site training services
- Command line interface integration or scripting
- Product keys for activation
- Recovery of lost passwords or end-customer data
- Support due to accidental or intentional damage by the end customer
- Any activities not expressly described in this section of the service description

For more information on LifeSize Assurance Maintenance Services, please see the LifeSize Partner Portal at <http://eportal.lifesize.com:8080/PartnerPortal/login.doc>

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### **Certification Programs**

#### ***Sales & Technical Certifications***

To maintain authorized status at your program level, all LifeSize Expert Video Partners and Professional Video Partners must meet the sales and technical certification requirements. Certification requirements will be reviewed quarterly along with the business plan, and LifeSize reserves the right to audit partners during the quarter for performance to date for both sales and technical certifications.

#### ***LifeSize Certified Sales Expert (LCSE)***

LCSE builds on the LCSP certification and provides information to successfully position LifeSize video device solutions and the LifeSize infrastructure product family, which includes the LifeSize Multipoint solution, LifeSize Control and LifeSize Transit, to your customers with an in-depth understanding of the product line.

#### ***LifeSize Certified Technical Expert (LCTE)***

LCTE builds on the LCTP certification, which establishes a solid foundation of skills for advanced configuration, management, maintenance and troubleshooting for the LifeSize infrastructure product families.

LifeSize sales and service certifications are available via the course outline on the LifeSize Partner Portal. Information and a course catalog regarding training courses can be found under the training section of the Partner Portal.

Certification requirements for Authorization and Assurance Services programs are as follows:

- When channel partners initially enter the LifeSize Channel Program and/or Assurance Program, they have 90 days to meet the certification requirements at the program level they are joining. Once in the program, the channel partners must maintain their certifications.
- Certifications must be held by full-time employees of the channel partner and must satisfy all certification requirements.
- All channel program sales and technical Expert certifications are valid for one year from date of certification.
- All Professional-level certifications are also valid for one year from date of certification. Individuals are required to refresh their program certifications prior to their certification expiration date.
- Certifications are based upon individual performance and remain with the individual.



- Channel partners must replace lost certifications within 60 days in the event a certified individual leaves their employ.
- The correct number of certifications must be maintained at the designated program level to be an authorized LifeSize partner. If you do not have the correct number of certifications, you will lose your authorization status and will be unable to participate in the related Channel Partner Program features and benefits.

### **LifeSize Certified Sales Professional (LCSP)**

LCSP provides information to successfully position LifeSize video device solutions, including the LifeSize Passport, Express, Team and Room product families and their associated accessories, to your customers with an in-depth understanding of the product line.

### **LifeSize Certified Technical Professional (LCTP)**

LCTP establishes a solid foundation of skills for advanced configuration, management, maintenance and troubleshooting for the LifeSize Passport, Express, Team and Room product families and their associated accessories.

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## **Opportunity Registration Program**

Partners have the opportunity to earn an additional discount of 5% or 10% off US list price based upon the opportunity size.

<b>If you sell a qualifying deal of</b>	<b>You can earn...</b>
Hardware & Services	<b>5% (list price) \$25K–\$149K</b> <b>10% (list price) ≥ \$150K</b> (Discount applies to hardware only)

Registered opportunities that meet the qualification requirements and are accepted by LifeSize will be given the additional discount at the time of purchase. In addition, LifeSize will provide sales support only to partners who have registered the opportunity, as long as the customer does not contact LifeSize and request that LifeSize work with another partner.

### **Eligibility**

- The channel partner must have a Direct or Indirect Reseller Agreement in good standing with LifeSize and maintain the authorized partner status.
- Any channel partner who does not maintain certification levels of Expert or Professional is not eligible for Opportunity Registration.
- The channel partner must be the first eligible partner to register the opportunity through the LifeSize Opportunity Registration website.
- The channel partner must actively pursue the opportunity.
- The channel partner must have an active business relationship with the customer.
- The channel partner must be able to demonstrate that it has the ability to sell the complete solution that the customer requires, including requisite contracts.
- For video endpoint and video infrastructure opportunities, the channel partner shall only bid LifeSize products and services to the customer.

### **Qualified Opportunities**

- Opportunities for new customers or new opportunities within existing LifeSize customers that are unknown to LifeSize and are not currently in LifeSize's pipeline are qualified:
  - A new customer is defined as a commercial entity that does not currently use LifeSize products.
  - A new opportunity within an existing customer is defined as a new sale of LifeSize products that enhances existing infrastructure or replaces competitive products within an existing LifeSize customer environment.
- Opportunities that are defined with an RFP or RFQ may be registered but must be approved by LifeSize prior to the RFP's or RFQ's being distributed publicly by the end customer.
- Opportunities that were not previously provided to the channel partner by LifeSize through prequalified lead distribution are also considered qualified opportunities.
- Opportunities must close and ship within six months of the registration date.
- Product coverage applies to all LifeSize hardware, software and services. Opportunity Registration is not available on Demonstration Kits.
- All opportunities, new or existing, must be brought to LifeSize. Opportunities that were previously assigned by LifeSize will not be qualified.
- All opportunities must be properly registered and forecasted to obtain the extra discounts.
- Discounts apply only to the hardware portion of the registrations.

### **Conditions of Registration**

- The channel partner agrees to allow LifeSize to participate in meetings with the end user.
- The channel partner agrees to notify LifeSize in the event that it decides not to bid the project. LifeSize will then be free to bid the opportunity or forward it to another reseller.
- This program may not be used in conjunction with any other LifeSize promotional pricing or nonstandard pricing.
- All approved registered opportunities will receive an Opportunity Registration Number (ORN).
- The bid must be properly forecasted upon registration in the Partner Portal to be approved for the extra discount. All registered opportunities can be approved without the final forecast number, but in order to receive the extra discount, all products and units must be properly entered in the Partner Portal.
- Opportunities must close and ship within six months of the registration date.
- Any channel partner who does not maintain certification levels of Expert or Professional is not eligible for Opportunity Registration.

### **Opportunity Registration Numbers**

- All registered and approved opportunities will receive an ORN.
- ORNs are issued at the time a registered opportunity is approved.
- ORNs will be updated as forecast amounts are updated.
- In order to receive your Opportunity Registration discount, you must have an ORN that has the exact same product type and quantities as the purchase order being placed with LifeSize or its distributor.
- All forecast amounts, quantities and products must match the ORN before the opportunity is marked as closed/won in the Partner Portal.
- All deals associated with an ORN must be marked as closed/won to be paid.
- Opportunities must close and ship within six months of the registration date.

### **Limitations of Program**

- Any channel partners who are not in good standing with LifeSize will not be able to participate in Opportunity Registration.
- Any channel partner who does not maintain certification levels of Expert or Professional is not eligible for Opportunity Registration.

- For resellers, the Opportunity Registration discounts may be taken only on new purchases placed with LifeSize or its distributor. Sales made by the channel partner from existing inventory will not be eligible for the Opportunity Registration discount.
- For distributors, all claims for the Opportunity Registration rebate must be submitted within 30 days of the sale to the customer.

***If at any time prior to the sale of LifeSize products to the customer, pursuant to a registered opportunity, the channel partner does not comply with any of the conditions or eligibility requirements set forth above, LifeSize may, at its sole discretion, revoke the Opportunity Registration and deny any additional discount. LifeSize may bid the opportunity itself and/or refer the opportunity to another channel partner.***

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## **Demo Equipment Program**

Demo equipment provides the opportunity for channel partners to demonstrate LifeSize products to their customers. Expert Video Partners and Professional Video Partners must purchase a minimum number of demo systems (Express, Team, Room, etc.) as specified below to use in their labs, training facilities or demonstration facilities. After 12 months of use, they may resell the equipment as used equipment without warranty.

### **Eligibility**

All authorized Expert Video Partners and Professional Video Partners are eligible if they maintain current certification criteria and program-level requirements, including maintaining all required certifications in good standing and current at quarter end and having a completed business plan that includes goals approved by LifeSize.

### **Program Guidelines**

Demo equipment is available for purchase at special discounts based upon a limited number of hardware products each year as identified below.

<b>Per Year</b>	<b>Expert Video Partner</b>	<b>Professional Video Partner</b>	<b>Registered Partner</b>
<b>Minimum Demo Gear Requirement</b>	2 endpoints	1 endpoint	-
<b>Maximum Demo Gear Available</b>	8 endpoints	4 endpoints	-

- Demo equipment is defined as equipment purchased by a channel partner solely for demo or use in a lab, training facility or demonstration facility.
- All LifeSize products are included (endpoints, infrastructure, and software).
- The channel partner must clearly indicate “demo equipment” on the purchase order to receive the applicable discount.
- Demo gear purchased through distribution will require a quote from the distributor.

- The channel partner must use this equipment as defined for no less than 12 months.
- After 12 months, the channel partner is authorized to resell this equipment to end users as used equipment without any warranty of any kind from LifeSize.

### **Program Limitations**

- *LifeSize Registered Video Partners cannot participate in this program.*
- Any channel partner who is past due on meeting program-level certification requirements or has expired certifications that cause it to fall below the minimum program-level certification requirement will not have access to the demo discount.
- The demo equipment discount is not available on Assurance Services, Professional Services or Education.
- Demo equipment discounts cannot be stacked upon any other program or promotional discounts.

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## Part 4: Frequently Asked Questions

- ✓ [Channel Partner Program FAQs](#)
- ✓ [LifeSize Certification FAQs](#)
- ✓ [Opportunity Registration FAQs](#)
- ✓ [Demonstration Equipment FAQs](#)

### **Channel Partner Program FAQs**

#### ***What does it mean to be authorized?***

To be authorized means that you have completed and are currently meeting or on track to meet all the program requirements at your level as defined in this Channel Partner Program guide. You must be authorized to participate in the Channel Partner Program benefits. Two of the three program levels are authorized levels; the third level is considered a registered level.

#### ***What does Registered Video Partner mean?***

A Registered Video Partner is a partner with an active status and an Indirect Reseller Agreement. Partners aspiring to a higher level must complete the program requirements. Once obtained, they will earn authorized status in the program. Program requirements must be maintained to retain an authorized status level.

#### ***How will the decision be made regarding placement of resellers to a program level?***

Decisions will be based upon sales performance, demonstration systems in place, number of certifications completed and an approved business plan.

#### ***What happens if I don't meet the sales volume goal? How will I know if I do not meet the requirement?***

You must meet the annual sales volume goal to maintain your partner level in the program. Your Channel Account Manager will meet with you regularly to review business activity, set joint goals, review performance in comparison to the business plan and make any adjustments required to your business plan to assist you in meeting the annual sales volume goal.

#### ***How is my sales volume requirement determined?***

Your sales volume must meet or exceed the required sales volume amount for your level in the Channel Partner Program. The goals are based on list price for all products and services sold directly from LifeSize or as reported through POS from your distributor.

#### ***How do I register for Partner Portal?***

Once you have a signed Reseller Agreement in place, you can register for Partner Portal access by sending an e-mail to [pportal@lifesize.com](mailto:pportal@lifesize.com). A login will be assigned within 24 hours.

### **Who do I contact with questions about the Channel Partner Program?**

Contact your LifeSize Channel Account Manager.

*LifeSize reserves the right to change this program and its partner requirements at any time, including but not limited to discounts, rebates, participation requirements and marketing funds. All information in this document is considered LifeSize confidential information and subject to the confidentiality provisions of the Reseller Agreements.*

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## **LifeSize Certification FAQs**

### **How do I obtain the sales and technical certifications required for the Channel Partner Program?**

LifeSize sales and technical certifications are available on the LifeSize Partner Portal.

### **How long are sales and technical certifications valid?**

Sales and technical Expert certifications and Professional certifications are both valid for one year after completion.

### **Will I be notified if my certification requirements are no longer being met?**

LifeSize will send a reminder e-mail 30 days prior to each individual's expiration date. Every quarter, you should review your certification status with your Channel Account Manager. You can find your company's authorization status and certification standing through your LifeSize Partner Portal Profile.

### **How long do I have to get recertified before my authorization is affected?**

If a certification expires, you should recertify immediately. LifeSize will review your status at the end of each quarter. If your certifications have lapsed, you will forfeit your access to all Channel Partner Program features and benefits and may be at risk of losing your current program-level standing.

### **What happens if I lose an employee who holds a certification? How long do I have to get somebody else certified to meet the requirements?**

If an employee who has the LCSE, LCSP or LCTE, or LCTP certification leaves your organization, you will need to replace that employee. You will have 60 days to obtain a new certification so you don't lose your authorization or partner-level status.

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## **Opportunity Registration FAQs**

### ***Can partners get a discount on single-unit opportunities?***

Yes, provided the opportunity size meets or exceeds the Opportunity Registration revenue requirement.

### ***Can partners get a discount on a single bridge or Video Center?***

Yes, all LifeSize hardware products are allowed for registration. Any combination of endpoints and bridges is acceptable.

### ***Do warranties count toward the Opportunity Registration revenue thresholds?***

Yes, warranties do count toward the Opportunity Registration revenue thresholds; however, the discount is valid only on endpoints at time of purchase.

### ***Can I get an Opportunity Registration discount for companies that previously closed when there is an opportunity for more deals?***

Yes, as long as the original opportunity was greater than the program minimum requirement and has closed and the additional units are registered as a new opportunity. Also, qualifying orders must be placed within one year of the original Opportunity Registration.

### ***What happens if I register an opportunity but do not add units or dollar amounts?***

All opportunities must have a product forecast and a meeting set up. Opportunities without a forecast amount will not be entered into the portal.

### ***There are multiple promotions happening at the same time. Can I take advantage of all of them on each order if they meet the requirements of the program?***

No, you can use only one promotion at a time. If you choose the 5% or 10% ORN discount, you must reference your ORN on the PO to get the 5% or 10% discount. Also, the ORN must be for the exact forecast in the portal. If not, you will need to update the portal first.

### ***How do I know if my company is eligible to participate in the program?***

Opportunity Registration is open to Authorized Expert Video Partners or Professional Video Partners in good standing with LifeSize. To participate in the Opportunity Registration program, your company must be currently authorized at your designated program level. Authorization is obtained by maintaining your respective program-level certification requirement.

### ***How do I register an opportunity?***

Complete the Opportunity Registration form on the Partner Portal at [www.lifesize.com/partners](http://www.lifesize.com/partners). All information must be completed in order to be eligible. You will receive an acknowledgement that your submission was received, and you will receive an e-mail either approving or rejecting your company as the registered partner for the opportunity. If you are approved, the e-mail will include the ORN. The reseller will need to provide a copy of the ORN to either LifeSize or its distributor when ready to provide a quote to the customer. Include the ORN on your purchase order to LifeSize or to your distributor to receive your additional discount points.

### ***What is a “new” opportunity?***

A new opportunity is one that does not already exist in the LifeSize pipeline or any other partners’ pipelines.

### ***How and when will I find out if I was awarded the additional discount?***

You will receive an e-mail notification from LifeSize within 48 hours of request. If the opportunity is approved, the e-mail will include the ORN and the contact information for your LifeSize sales representative. You should save this e-mail because you will need the information to obtain your additional discount when you place your PO. The LifeSize sales representative assigned to your registered opportunity will be available to join you for customer meetings and to assist you in closing the opportunity.

### ***How will I know if I was not awarded the Opportunity Registration discount?***

You will be notified by e-mail if you were not awarded the additional Opportunity Registration discount. You may not be awarded the Opportunity Registration discount if LifeSize is already working with the customer or opportunity, if another LifeSize channel partner has already registered the new customer or opportunity or if your company does not meet the qualification requirements.

### ***If I was not awarded the additional discount, can I reapply?***

No. If an opportunity is declined, it's because it was already identified in the LifeSize pipeline or was not a qualified opportunity. Reapplying will not change the outcome; once a new customer or opportunity has been registered, it cannot be registered again.

### ***How do I know that LifeSize is not going to use the end-user information I provide to take the opportunity directly?***

LifeSize is committed to the channel and its reseller partners and as such will make every effort to ensure that all registrations are kept confidential except in those cases in which LifeSize is asked for assistance to close an opportunity and must contact the end customer.

### ***What happens if I decide not to bid the opportunity after it has been approved?***

Notify your Channel Account Manager immediately. LifeSize will remove the approved Opportunity Registration designation and reserves the right to follow up on the opportunity directly or indirectly through another partner.

### ***What if I lose the opportunity?***

Notify your Channel Account Manager immediately and update the portal to closed/lost so that we can mark it accordingly in our pipeline.

### ***What happens if I lose my certifications within the six-month sales window on an approved deal?***

Any opportunities already approved remain qualified and the discount will be honored. However, your company will not be able to register new opportunities until your certifications are made current.

### ***Can I register the same customer twice for different locations or projects?***

Yes, as long as each registration meets the qualified opportunity criteria listed in the terms and conditions.

### ***If I am awarded the Opportunity Registration discount, how long will it apply to the opportunity?***

The opportunity must close and ship completely within six months of the registration date.

### ***If the opportunity exceeds six months, can I reapply?***

After six months, the opportunity will no longer be considered registered and the Opportunity Registration discount will no longer be valid. The opportunity must close and ship completely within the six-month time frame from the date it is registered. Once the new opportunity is registered, it cannot be registered again. It will



no longer be considered a new opportunity.

***What happens if shipment is pushed out beyond the six-month period?***

The discount will not be valid on any products shipped beyond the six-month time frame from the date the opportunity was registered.

***What happens if I already have nonstandard pricing (NSP) in place?***

Any customers or opportunities that LifeSize is already aware of do not qualify for the new customer or opportunity requirements of this program. If you already have an open NSP covering the end user, then the opportunity is already known to LifeSize and cannot be registered.

***Can I combine the Opportunity Registration discount with other promotions/discounts to win the business?***

The Opportunity Registration discount is not stackable on any other nonstandard pricing or promotions unless specified within the program guide.

***Who is notified of newly registered opportunities?***

An e-mail notification goes to all sales directors. If the opportunity comes from an indirect partner, then the partner's distributor will also be notified.

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## **Demonstration Equipment FAQs**

### ***How do I purchase demo equipment?***

To purchase demo equipment, you need to submit a purchase order with “demo equipment” clearly marked on it if you are a direct partner or request a quote from your distributor.

### ***How long will it take to process the order?***

Just like any other order, a demo equipment order is queued according to date of receipt by LifeSize or your distributor, so the length of time for processing is dependent upon order quantity in queue and product availability.

### ***How do I make sure my discount is included on the order?***

Make sure you clearly indicate on your purchase order that the order is for “demo equipment” to receive the applicable discount.

### ***What if I am ordering from a distributor?***

If purchasing demo equipment from a distributor, you must obtain a quote from the distributor.

### ***Can I resell demo equipment to an end user?***

You can resell demo equipment as used equipment 12 months after purchase. Used equipment is sold without warranty.

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## **Marketing with LifeSize Guide**

Here at LifeSize, we provide a host of resources to enable partners to customize tools to suit their own marketing requirements. Covering everything from web copy to data sheets, high-res images, e-mail and brochure templates, you'll find everything you need to start planning your marketing activities.

**Partner Portal** – This is the first place to go to for access to all LifeSize marketing resources, including how-to guides on popular marketing programs.

**Consultancy** – Your Channel Marketing Manager can advise you on successful activities based on experience with partners worldwide.

**Funding** – If you are planning lead-generation programs and activities, you can request marketing funds from LifeSize. Generally, this contribution will be 50% of costs or less and is also dependent on the number of vendors/manufacturers involved. However, all final contribution amounts are at the discretion of the Channel Marketing Manager. If approved, support will be paid in the form of a credit memo (for Expert Video Partners) or check (for Professional Video Partners) based on the following criteria:

- ✓ Full campaign details preapproved by your Channel Marketing Manager
- ✓ Submission of a detailed plan, including:
  - Event name, location, date and time
  - Target audience
  - Precampaign marketing
    - List acquisition, e-mail campaign and telemarketing
  - Postcampaign marketing plans
    - Follow up, CRM, LifeSize, e-mail and telemarketing
  - Estimated outcomes and measurement
    - Including expected number of attendees
- ✓ Agreement to share all leads by submitting attendance lists, inclusive of full-contact information, to your Channel Marketing Manager and/or by directly uploading opportunities to the portal. Partners may also submit contact information by registering opportunities through the Partner Portal and indicating that it is a "Joint Marketing Activity with LifeSize."
- ✓ Have a lead follow-up plan in place (for leads generated by LifeSize or partner)

### **Sample marketing activities supported by LifeSize marketing funds:**

- "Room in Action" demo days, including room hire (where necessary), catering, bandwidth requirements, etc.
- Multivendor seminars (with complementary solutions)
- E-mail campaigns
- Online demand-generation campaigns
- Corporate sponsorships and speaking engagements
- Telemarketing programs (when executed to existing databases or as a follow-up to lead-generation activities; list buys must be justified, and approval is at the sole discretion of your Channel Marketing Manager)
- Trade shows, seminars and exhibitions

- Direct-mail campaigns

**Marketing activities NOT supported by LifeSize marketing funds:**

- Normal, everyday sales activities such as customer meetings, presentations or proposal preparation
- Paying all or part of channel partner employees' salaries (i.e., funded heads)
- Partner website creation
- SEM in regions where LifeSize already has programs in place
- Database list buys (unless specifically approved by your Channel Marketing Manager)
- Travel expenses
- Nonincentive-based hospitality events such as golf days and football tickets
- Gifts for customers
- Product demo units

***LifeSize Marketing Contribution Request Process***

The above lists are guidelines to the types of activities that will or will not be considered. However, all submissions are subject to approval by the LifeSize Channel Marketing Team.

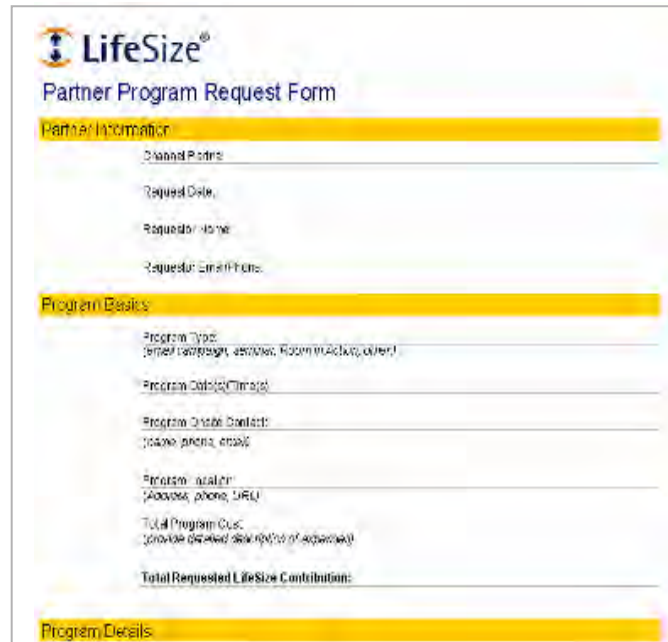
**Planning**

As a global company, LifeSize supports hundreds of partners. To ensure the success of your marketing activity and that LifeSize can offer the most added value in terms of resource support, plans should be in place at least six weeks in advance.

**Preapproval**

Once your marketing programs have been defined, complete and submit the relevant forms to your Channel Marketing Manager, who will respond within five working days. It is important that you complete each form with the full details of the activity, expected outcomes and costs.

### Partner Marketing Program Request Form for one-off activities:



**LifeSize®**  
**Partner Program Request Form**

**Partner Information:**

Channel Partner:  
 Request Date:  
 Requestor Name:  
 Requestor Email/Phone:

**Program Basics:**

Program Type:  
 (enter campaign, seminar, Room in Action, other)

Program Dates/Times:

Program Title/Contact:  
 (name, phone, email)


Program Location:  
 (Address, phone, URL)

Total Program Cost:  
 (provide detailed description of equipment)

Total Requested LifeSize Contribution:

**Program Details:**

### LifeSize Marketing Plan Template for quarterly/twice-yearly integrated campaigns:

LifeSize Partner Marketing Plan												
Partner Name: Reseller X Q1 2009 												
Full Campaign details	Dates & Times	LifeSize specific or multi-vendor activity	Audience	Pre-campaign marketing	Post-campaign marketing	Status	Estimated outcomes	Measurement	LifeSize contribution	Total Cost	LifeSize MBF	Leads uploaded to Partner Portal
(include activity name, type, location, contact person and details)			(end user or reseller/reviewer)	(see description, email campaign, relationship)	(follow up, CRM, LinkedIn, email, telemarketing)		(include opportunities & risks where possible)	(Actual outcomes)	(Resource / demo / financial tracking)			
Room in Action demo event, Reseller X premises, Joe Bloggs, 555-1234-5678	Jan 5-6	LifeSize specific	End-user	Email invite, telemarketing	Email thank you, telemarketing	✓	2,000 invites sent, 50 attendees over 2 days, 10 opportunities with 5 conversions within 3 months	47 attendees, 15 opportunities, 5 conversions to sales worth \$30,000	Demo resource and 50% contribution to costs	\$500	\$250	Yes
ICT Expo, ABC Town, Joe Bloggs, 555-1234-5678	Mar 3-5	Multi-vendor (4 in total)	End-user	Email invite, posting on website, telemarketing	Email thank you, telemarketing	✓	150 stand visitors, 25 follow up demos, 10 opportunities, 5 conversions	204 stand visitors, 37 follow up demos, 15 opportunities, 6 conversions to sales worth \$42,000	Stand resource and 20% contribution to total costs	\$10,000	\$2,000	Yes
<b>Totals</b>											<b>\$2,250</b>	

#### Obtain promotional items

LifeSize provides a Partner Store that allows you to purchase LifeSize and/or cobranded promotional items for your campaign and sales needs. All items are provided to you at cost. Items include giveaways, apparel and trade show essentials.

#### Carry out activity

Make sure to check the Partner Portal for product collateral, e-mail HTML templates, event display graphics and high-resolution images and logos to help you execute your plans. Where possible, we can also add your Room in

Action/demo event, trade show, seminar or expo details on the LifeSize Events page to further promote attendance to your event.

### **Submit funding request**

Upon completion of your marketing activities, submit your invoice, attendance list and proof of performance (e-mail invite, DM piece and photos of event) and completed marketing plan with the final details recorded in the measurement section.

**Important:** Your credit memo or check request cannot be processed until your Channel Marketing Manager has received all supporting information. Credit memos or checks will be issued within 30 days.

**Please Note:** LifeSize offers support in the form of credit notes to Expert Video Partners or check reimbursements to Professional Video Partners.

### **Why ROI?**

Why do we request so much information from our partners about their marketing campaigns? To help ensure your success! Making the very best use of all resources available means we can learn what does and doesn't work, share results and amend campaigns/tools accordingly so future campaigns can yield better results.

### **What to do next:**

- ✓ **For one-off activities**  
Fill in Partner Marketing Programs Request Form
- ✓ **For quarterly/twice-yearly collaborative marketing plans**  
Complete LifeSize Partner Marketing Plan

**Note:** Both forms can be downloaded from the Partner Portal. Documents/Marketing and Sales Tools/Other

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